



CHESTER J. CULVER  
GOVERNOR  
PATTY JUDGE  
LT. GOVERNOR

2009 JUN 24 AM 8:29

## STATE OF IOWA

DEPARTMENT OF ELDER AFFAIRS  
JOHN MCCALLEY, DIRECTOR

June 22, 2009

### MEMORANDUM

To: Charlie Smithson, Executive Director, Iowa Ethics and Campaign Finance Disclosure Board

From: John McCalley, Director, Iowa Department of Elder Affairs

RE: Voluntary Disclosure 2009 Governor's Conference on Aging and related activities

The following voluntary annual report is being provided relative to the Aging Well Expo – 30<sup>th</sup> Annual Governor's Conference on Aging, and the Aging and Action Forum – Partnering through Hard Times.

The four-day Aging Well Expo was cancelled due to the economic downturn on March 27, 2009 in consultation with the Governor and the Elder Affairs Commission. It was replaced with the Aging and Action Forum which was held on Wednesday, May 13, 2009.

The following documents are attached for your information.

#### Aging Well Expo – 30<sup>th</sup> Annual Governor's Conference on Aging

- ❖ A listing of conference steering committee members.
- ❖ A copy of the letters for the solicitation of conference sponsors.
- ❖ A listing of all conference sponsorships and the amount received.
- ❖ A copy of the letters for the solicitation of conference vendors.
- ❖ A listing of all conference vendors and the amount received.
- ❖ A copy of the finalized conference budget documenting actual conference revenue and expenses.
- ❖ A copy of the conference registration brochure.

#### Aging and Action Forum – Partnering through Hard Times

- ❖ A copy of the e-mail message seeking Aging Well Expo sponsors wishing to support the new event;
- ❖ A listing of all conference sponsorships and the amount received;
- ❖ A copy of the e-mail message seeking Aging Well Expo exhibitors wishing to exhibit at the new event;
- ❖ A listing of all forum vendors and the amount received;
- ❖ A copy of the finalized Aging and Action Forum budget documenting actual revenue and expenses;
- ❖ A copy of the Aging and Action announcement; and
- ❖ A copy of the Aging and Action program.

The report will be submitted on or before June 30<sup>th</sup> in each fiscal year.

If any further documentation is required, please don't hesitate to contact me.

CC: Hugh Ceaser, Department of Management

**AGING WELL EXPO**  
**2009 Governor's Conference on Aging**

Financial Report

REVENUE	2009 Proposed		2009 Actual	
<b>201 Fed Supp</b>		\$ 8,000.00	\$ 8,000.00	\$ 8,000.00
<b>204 Transfer</b>		\$ 60,000.00	\$ -	\$ -
<b>401 Fees</b>		\$ 80,000.00		\$ 20,460.00
Registrations/CE/Lunch			\$ 2,190.00	
Exhibitors			\$ 18,270.00	
<b>501 Refunds/Reimbursements</b>				\$ 13,800.00
Speaker Fees			\$ 13,800.00	
<b>704 Other</b>		\$ 65,000.00		\$ 27,025.00
Fundraising			\$ 27,025.00	
<b>Total Revenue</b>	\$ -	\$ 213,000.00		\$ 69,285.00
<b>EXPENSES</b>				
<b>202 US Travel</b>		\$ 100,000.00		\$ -
<b>301 Office Supply</b>		\$ 100.00		\$ 21.28
Photo Copies			\$ 21.28	
Miscellaneous				
<b>308 Other Supplies</b>		\$ 700.00		\$ -
<b>309 Print &amp; Bind</b>		\$ 5,200.00		\$ 204.83
Photo Copies			\$ 204.83	
<b>313 Postage</b>		\$ 500.00		\$ 296.34
Registration Brochure			\$ 296.34	
Other				
<b>402 Rentals</b>		\$ 35,000.00		\$ -
<b>405 Prof Services</b>		\$ 15,000.00		\$ 222.74
Registration Service			\$ 222.74	
<b>406 Outside Services</b>		\$ 45,000.00		\$ 15,535.49
<b>*Printing*</b>				
Registration Brochure			\$ 1,680.00	
Speakers			\$ 13,800.00	
<b>*Mail Services*</b>				
Registration Brochure			\$ 55.49	
<b>408 Advertizing/Publicity</b>		\$ 1,500.00		\$ 396.90
Pens			\$ 396.90	
<b>602 Other Expenses</b>		\$ 8,500.00		\$ 25.00
Accreditation Fees			\$ 25.00	
<b>705 Refunds/Other</b>		\$ 1,500.00		\$ 55,485.00
Pledge Refund/Transfer			\$ 35,025.00	
Exhibitor Fee Refund/Transfer			\$ 18,270.00	
Registration Refund			\$ 2,190.00	
<b>Total Expenses</b>		\$ 213,000.00		\$ 72,187.58
<b>YTD TOTAL</b>	\$ -	\$ -		\$ (2,902.58)
Carryover			\$ 9,335.95	\$ 9,335.95
Reserve			\$ 20,000.00	\$ 20,000.00
<b>TOTAL EXCESS (Deficit)</b>	\$ -	\$ -		\$ 6,433.37

Aging Well Expo Exhibitors

Amount Paid	Organization
\$ 700.00	AARP Iowa
\$ 2,000.00	ABCM Corporation
\$ 250.00	Alzheimer's Association-Greater Iowa Chapter
\$ 1,050.00	Bethany Life Communities
\$ 350.00	Calvin Community
\$ 350.00	Compassion & Choices of Iowa
\$ 1,050.00	Deerfield Retirement Community
\$ 250.00	FitXpress LLL
\$ 700.00	GA Food Service, Inc
\$ 250.00	Hammer Medical Supply
\$ 350.00	Hospice of Central Iowa
\$ 250.00	Iowa CareGivers Association
\$ 350.00	Iowa Compass
\$ 250.00	Iowa Dept of Public Health-Chronic Disease
\$ 1,000.00	Iowa Dept of Transportation
\$ 350.00	Iowa Health Home Care
\$ 350.00	Iowa SMP
\$ 750.00	Magellan Health Services
\$ 750.00	Mass Mutual Financial Group
\$ 250.00	Mill Pond Retirement Community
\$ 1,050.00	Mom's Meals
\$ 350.00	National Committee to Preserve Social Security & Medicare
\$ 1,570.00	Nurse Force
\$ 500.00	Oliver Products Company
\$ 250.00	Relay Iowa / Telecommunication Access Iowa
\$ 250.00	SHIIP
\$ 700.00	Social Security Administration
\$ 350.00	U.S. Dept. of Housing & Urban Development
\$ 250.00	United States Senator Charles Grassley
\$ 700.00	Walnut Ridge at Clive
\$ 700.00	Wesley Retirement Services
<b>\$ 18,270.00</b>	<b>TOTAL</b>

# Aging Well Expo Sponsors

Amount Rec'd	Organization
\$ 3,000.00	ActivStyle, Inc.
\$ 1,000.00	American Equity Investment Life Insurance Company
\$ 250.00	Alzheimer's Association-Greater Iowa Chapter
\$ 500.00	Friendship Haven
\$ 100.00	Heritage Care Center - Iowa Falls
\$ 3,000.00	Hy-Vee, Inc.
\$ 500.00	Iowa Association of Homes and Services for the Aging
\$ 3,000.00	Iowa Dept of Commerce, Insurance Division
\$ 3,000.00	Iowa Dept of Human Services
\$ 2,000.00	Iowa Foundation for Medical Care
\$ 1,000.00	Iowa Health Care Association
\$ 200.00	Iowa Health Care Collaborative
\$ 250.00	Iowa Jewish Senior Life Center
\$ 200.00	Iowa Optometric Association
\$ 2,000.00	Iowa State University Extension to Families
\$ 2,000.00	Life Care Retirement Communities Inc
\$ 1,000.00	MidAmerican Energy Company
\$ 400.00	Pella Rolscreen Foundation
\$ 25.00	Prairie View Management, Inc.
\$ 100.00	The Alverno Health Care Facility
\$ 3,000.00	Wellmark Blue Cross Blue Shield
\$ 500.00	Western Home Communities
<b>\$ 27,025.00</b>	<b>SUBTOTAL</b>
\$ 5,000.00	AoA-Older American's Act Title VII
\$ 3,000.00	Office of the State Long Term Care Ombudsman
<b>\$ 35,025.00</b>	<b>TOTAL</b>

**Aging and Action Forum**  
Financial Report

REVENUE	Proposed	Actual
<b>204 Transfer</b>	\$ 1,500.00	\$ 1,500.00
<b>401 Fees</b>	\$ 5,200.00	\$ 8,900.00
Lunch guests (0581)		\$ 600.00
Exhibitors (0520)		\$ 8,300.00
<b>704 Other</b>	\$ 27,000.00	\$ 22,175.00
Fundraising (0683)		\$ 22,175.00
<b>Total Revenue</b>	\$ - \$ 33,700.00	\$ 32,575.00
<b>EXPENSES</b>		
<b>202 US Travel</b>	\$ 23,800.00	\$ 8,465.50
Luncheon (2121)		\$ 8,409.50
Guest Rooms (2122)		\$ 56.00
<b>301 Office Supply</b>	\$ 100.00	\$ -
Miscellaneous		
<b>308 Other Supplies</b>	\$ 300.00	\$ 367.84
Badge Ribbons (2299)		\$ -
Picture Frames (2299)		\$ -
Lifetime Award (2299)		\$ 207.84
Signage (2299)		\$ 160.00
<b>402 Rentals</b>	\$ 5,000.00	\$ 20,092.82
A/V (2423)		\$ 8,463.30
Facility Rental (2427)		\$ 10,125.00
Exhibits (2430)		\$ 1,504.52
<b>405 Prof Services</b>	\$ 2,500.00	\$ 1,977.99
Photographer (2460)		\$ 400.00
Registration Service (2469)		\$ 1,577.99
<b>406 Outside Services</b>	\$ 2,000.00	\$ 1,191.60
<b>*Printing* (2356)</b>		
Program		\$ 831.60
Closed Captioning (2453)		\$ 360.00
<b>408 Advertising/Publicity</b>	\$ -	\$ 2,000.00
Publicity & Public Info (2353)		\$ 2,000.00
<b>602 Other Expenses</b>	\$ -	
<b>705 Refunds/Other</b>	\$ -	
<b>Total Expenses</b>	\$ 33,700.00	\$ 34,095.75
<b>TOTAL EXCESS (Deficit)</b>	\$ - \$ -	\$ (1,520.75)

Aging and Action Forum Exhibitors

Amount Paid	Organization
\$ 350.00	AARP Iowa
\$ 350.00	ABCM Corporation
\$ 250.00	Alliance for Retired Americans
\$ 250.00	Alzheimer's Association-Greater Iowa Chapter
\$ 350.00	Compassion & Choices of Iowa
\$ 350.00	GA Food Service, Inc
\$ 250.00	Hammer Medical Supply
\$ 350.00	Hospice of Central Iowa
\$ 250.00	Iowa Dept of Public Health-Chronic Disease
\$ 1,000.00	Iowa Dept of Transportation
\$ 350.00	Iowa Health Home Care
\$ 350.00	Iowa Veterans Home
\$ 250.00	Magellan Health Services
\$ 350.00	Mass Mutual Financial Group
\$ 350.00	Mom's Meals
\$ 350.00	National Committee to Preserve Social Security & Medicare
\$ 250.00	Oliver Products Company
\$ 500.00	Phillips Lifeline
\$ 250.00	Relay Iowa / Telecommunication Access Iowa
\$ 250.00	Senior Suites of Urbandale
\$ 250.00	SHIIP
\$ 350.00	The View Senior Living
\$ 350.00	U.S. Dept. of Housing & Urban Development
\$ 350.00	Walnut Ridge at Clive
<b>\$ 8,300.00</b>	<b>TOTAL</b>

# Aging and Action Forum Sponsors

Transfer Amt	Organization
\$ 3,000.00	ActivStyle, Inc.
\$ 1,000.00	American Equity Investment Life Insurance Company
\$ 500.00	Friendship Haven
\$ 100.00	Heritage Care Center - Iowa Falls
\$ 3,000.00	Hy-Vee, Inc.
\$ 500.00	Iowa Association of Homes and Services for the Aging
\$ 3,000.00	Iowa Dept of Commerce, Insurance Division
\$ 1,000.00	Iowa Dept of Human Services
\$ 3,000.00	Iowa Family Caregiver Program
\$ 1,000.00	Iowa Health Care Association
\$ 200.00	Iowa Health Care Collaborative
\$ 250.00	Iowa Jewish Senior Life Center
\$ 200.00	Iowa Optometric Association
\$ 2,000.00	Iowa State University Extension to Families
\$ 2,000.00	Life Care Retirement Communities Inc
\$ 1,000.00	MidAmerican Energy Company
\$ 400.00	Pella Rolscreen Foundation
\$ 25.00	Prairie View Management, Inc.
<b>\$ 22,175.00</b>	<b>SUBTOTAL</b>
\$ 1,500.00	State Long-Term Care Ombudsman
<b>\$ 23,675.00</b>	<b>TOTAL</b>